IDD Connects System
Support Coordinator/State Service Coordinator
User Guide
Introduction

The user guide for the IDD Connects System describes how a specific user will interact with the system based upon their role. This guide helps the user understand how to perform tasks and navigate through the system. Each task includes step by step instructions with the accompanying screenshot taken from the IDD Connects System and a description of the screen.

Each user of the system accesses the IDD Connects System entering the URL https://idd.georgiacollaborative.com/IDDPortal/IDD.

User Role: Support Coordination/State Services Coordination

1. Eligibility Tab

1.1 Funding and Resource Assignment

1.1.1 Individual with Waiver Funding Assigned to Support Coordination (SC Agency Admin)

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on the CID# for a particular task to navigate to Demographic tab of the Individual
- Step 4: Click on the Eligibility tab.
- Step 5: Click on the Funding tab.
- Step 6: View Assigned SC Agency.
- Step 7: Assign Support Coordinator.

Figure 1: Eligibility/Funding Page
2. Individual Service Plan (ISP)

2.1 Create ISP

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on the CID# for a particular task to navigate to Demographic tab of the Individual.
- Step 4: Click on the ISP tab.
- Step 5: Click on the Create New ISP button and the ISP Type and click Ok.
- Step 6: Click on the ISP type hyperlink, which would reflect the approved funding type.
- Step 7: Complete all the sections in the ISP and Click on the Submit button.
2.4.1 Current Needs

- Step 1: Click on the ISP type tab.
- Step 2: Click on the ISP Section tab and then the Current Needs tab on the left side of the navigation to view the HRST and SIS results information.
- Step 3: Click on the plus sign (+) to the left of each domain to allow a Domain Comments to be entered in to the text box. Enter the required content in Domain Comments for each SIS Domain.
- Step 3: Select the Service Type and Service Status, as applicable, for each the SIS Domains.
- Step 4: Review the Exceptional Behavioral Support Needs identified by the SIS. If there is a significant behavioral support need not listed, select “Other” to add the additional behavior.
- Step 5: Select Yes or No for Consideration of PBSP/Safety Plan for each Exceptional Behavioral Support Need.
- Step 6: Enter the required content in Comments, beside each Exceptional Behavioral Support Need.
- Step 7: Enter date the PBSP/Safety Plan will be due, based on team decision.
Figure 6: ISP/Current Needs

Figure 7: ISP/Current Needs

Figure 8: ISP/Exceptional Behavioral Supports
2.4.2 ISP Clinical Recommendations

- Step 1: Click on ISP type tab.
- Step 2: Click on the ISP Section tab to the Clinical Recommendation tab on the left side of the navigation.
- Step 3: Click on the Expand All hyperlink, which will expand the Clinical Recommendations, and review.
- Step 3: Complete the Accept and Acknowledgement Clinical Evaluation Recommendation.
- Step 4: Click the Save button.

![Figure 9: ISP/Clinical Recommendations Section](image1)

![Figure 10: ISP/Clinical Recommendations Section](image2)
2.4.3 ISP Goals

- Step 1: Click on the ISP type tab.
- Step 2: Click on the ISP Section tab to the Goals tab to enter Person Centered Goals.
- Step 3: Select the type of goal from the drop-down list of selections.
- Step 4: Enter goal description.
- Step 5: Click the Add button, which will populate the goal into the Person Centered Goals table.
- Step 6: Enter the Individual’s Strengths.
- Step 7: Select the goal for which you are adding an Action Plan.
- Step 8: Complete each required field of the Action Plan. Note that an additional text box can be added to add additional content, if needed.
- Step 9: Click on the Add Desired Outcome/Goal button, which will populate the Action Plan into the Action Plans table.
- Step 10: Click the Save button.

![Figure 11: ISP/Goals Section](image)

![Figure 12: ISP/Goals Section](image)
Figure 13: ISP/Goals Section

Figure 14: ISP/Goals Section

Figure 15: ISP/Action Plans Section
Note: The system will alert the user when information is entered incorrectly and/or information is missing.

2.4.4 ISP Service Summary

- Step 1: Click on the ISP type tab
- Step 2: Click on the ISP Content tab and click on the Service Summary tab.
- Step 3: For any service listed, click on the drop-down within the Detailed Service Description column to select the specific service for each line item.
- Step 4: Enter the remaining required fields in the table.
- Step 5: Enter the Minimum FTF Visit Frequency required by selecting the appropriate option from the drop-down listing.
- Step 6: To add a service, click the Add New Services button and select the Service Description from the drop-down listing and complete the remaining required fields. (when applicable)
- Step 7: To remove a service, select the service by clicking the box to the left of the service, then click the Remove Service button. (when applicable)
- Step 8: Click on the Save button when the Service Summary is complete.

Figure16: ISP/Service Summary
2.4.5 ISP Informed Choice

- Step 1: Click on ISP Content Completed tab
- Step 2: Click on the ISP Content tab, then the Informed Choice tab.
- Step 3: Complete all required fields.
- Step 4: Click on the Save button.

Note: If needed, click on the void button to reenter information to the required fields.

2.4.6 View ISP Signature Page

- Step 1: Click on the ISP type tab
- Step 2: Click on the ISP Content tab, then the Signature tab on the left side of the navigation.
- Step 3: Enter the ISP Meeting Date.
- Step 4: Click on the Add a New Participant hyperlink to enter meeting attendees.
- Step 5: Download the Signature Page (this can be done prior to the ISP Meeting in order to capture the signatures of attendees.)
- Step 6: Click on an attendee when signed the Signature Page to Upload the Signature page.
- Step 7: Click on the box to attest that the user has uploaded a Signature Page containing the individual/authorized representative signature.
- Step 8: Once Signature Pages for all required participants have been uploaded, click the Save and Submit button

Note: If needed, click on the void button to re-enter information to the required fields.
Figure 19: ISP/Signature Page

Figure 20: ISP/Signature Page

Figure 21: ISP/Signature Page
2.5 Rejected ISP by Clinical Reviewer

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on the CID# for a particular task to navigate to Demographic tab of Individual
- Step 4: Click on the ISP tab.
- Step 5: Click on the ISP which needs to be updated/revised
- Step 6: Click on the Clinical Approval tab on the left side of the navigation to view the ISP Clinical Reviewer’s rejection comment.
- Step 7: Click on the ISP Content Completed tab and make the necessary corrections/updates.
- Step 8: Click Submit.

Figure 23: ISP Rejected
3.0 Update Approved ISP - Clinical Update (Clinical change or Service change)

Note: Non-Clinical updates of the Goal section of the ISP does not require an approval.

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on the CID# for a particular task to navigate to Demographic tab of Individual
- Step 4: Click on the ISP tab.
- Step 5: Click on the ISP which needs to be updated.
- Step 6: Click on the Create New ISP Version button.
- Step 7: Select option change (Clinical or Service).
- Step 8: Enter updates in any relevant section to reflect the Clinical or Service change.
- Step 9: Complete the Informed Choice and click on the Save button.
- Step 10: Signature Page upload (If needed)
- Step 11: Click on Submit.

Note: The previous Signature Page can be found under the Documents tab.
Figure 26: ISP New Version

Figure 27: ISP New Version

Figure 28: ISP New Version
3.1 ISP Approval Process

3.1.1 ISP Clinical Review

- Step 1: Log into IDD Connects portal.
- Step 2: View Tasks in ‘View My Tasks’ tab
- Step 3: Click on ‘CID#’ for a particular task to navigate to Demographic tab of the Individual.
- Step 4: Click on the ‘ISP’ tab.
- Step 5: Click on the ISP hyperlink, which needs approval.
- Step 6: Click on the Clinical Approval Tab to the left of the navigation.
- Step 7: View the details relating to the Approval Decision and any Medical Director comments.

Figure 31: ISP Clinical Reviewer

3.1.2 Individual to Review and Approve ISP (Offline)

- Step 1: Log in IDD Connects portal.
- Step 2: Search an Individual.
- Step 3: Click on ‘CID#’ for a particular task to navigate to Demographic tab of the Individual.
- Step 4: Click on ‘ISP’ tab.
- Step 5: Click on the ISP which needs to be approved.
- Step 6: Click on Individual Approval Tab.
- Step 7: Enter the Approval Decision and other details and click on Submit.

Figure 32: Individual Approval
3.1.3 Individual to Review and Approve ISP (Online)

- Step 1: Log in IDD Connects Individual portal
- Step 2: Click on the Approve Individual Service Plan tile
- Step 3: Enter the Approval Decision and other details and click on Submit.

Figure 33: Individual Dashboard

Figure 34: Individual ISP Approval
3.1.4 Final Approval

- Step 1: Log into the IDD Connects portal.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on the CID# for a particular task to navigate to Demographic tab of the Individual.
- Step 4: Click on the ISP tab.
- Step 5: Click on ISP which needs to be approved.
- Step 6: Click on the Final Approval tab to the left of the navigation.
- Step 7: Enter the Approval Decision and other details and click on the Submit button.

Figure 35: Final Approval

4. Granting/Revoking Individual Level Access

Through grant temporary access feature temporary access to individual’s record is granted; however it is not intended for re-assignment of individual to another user’s caseload. Mostly granting access to Provider users or SC agency users. Staff can revoke temporary access to individuals who were granted access.

4.1 Grant Access

- Step 1: User logs in DBHDD portal
- Step 2: User accesses Grant/Revoke Individual Access section under User Administration
- Step 3: User selects Grant option and enters user’s name
- Step 4: User selects the correct user from the options available
Step 5: User either filters or manually selects the individual(s)
Step 6: User clicks on Grant Access and receives success message.

4.2 Revoke Access
Step 1: User logs in DBHDD portal
Step 2: User accesses Grant/Revoke Individual Access section under User Administration
Step 3: User selects Revoke option and enters user’s name
Step 4: User selects the correct user from the options available
Step 5: User either filters or manually selects the individual(s)

Figure 36: Grant/Revoke Access
Figure 37: Grant/Revoke Access
5. Prior Authorizations (PA)

5.1 Select Providers for Approved Services

Note: The Support Coordinator/State Service Coordinator will be selecting providers for all approved services.

- Step 1: Login into the IDD Connects portal.
- Step 2: Click on the Search an Individual and click on Individual’s CID# to navigate to the Demographic tab of the Individual.
- Step 3: Click on the Prior Authorization tab.
- Step 4: Click on the Select Providers for Approved Services button.
- Step 5: Enter the details for the service line items in Services section.
- Step 6: Select the Provider, if known, or select Provider in Search if unknown.
- Step 6: Click on the Finalize Service in ISP button.
5.2 View Services and Claims

- Step 1: Log in IDD Connects portal.
- Step 2: Search an Individual and click on the ‘CID#’ to navigate to Demographic tab of the Individual.
- Step 3: Click on the Service Authorizations & Utilization tab to view current authorizations.
- Step 4: Click on the Claims tab Services to view all submitted and processed claims data.
6. Outcomes & Support Notes

6.1 Individual Quality Outcome Measures Review

6.1.1 Add/Review Outcome Review

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on CID# for a particular task to navigate to Demographic tab of the Individual.
- Step 4: Click on the Outcomes & Support Notes tab and click on the Individual Quality Outcome Measures Review date hyperlink in the table to open the selected Outcome Review.
- Step 5: Click the Add New Outcome Review button and the system generates a new form to complete.
- Step 6: Complete Outcome selection and Comments for each item within each Focus Area. If ‘Acceptable’ is not selected as the Outcome, the user must complete the required Coaching or Referral fields for each item.
- Step 7: Click on Submit.

Note:

- To download the Outcome Review, click on the download button and select download option.
- To Void an Outcome Review, click on the ‘Void’ button.
Figure 43: Individual Quality Outcome Measures Review page
Figure 44: Individual Quality Outcome Measures Review template
6.1.2 Add Look Behind in Individual Quality Outcome Measures Review (Supervisor and Manager)

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on the CID# for a particular task to navigate to Demographic tab of the Individual.
- Step 4: Click on Outcomes & Support Notes tab and click on the Individual Quality Outcome Measures Review date hyperlink in the table to open the selected Outcome Review form.
- Step 5: Click on the Date of Visit button.
- Step 6: Click on the Add a Look Behind button.
- Step 7: Enter details in the Look Behind section and click on the submit button.

![Figure 45: Quality Outcome Review template view of the Look Behind section (Manager only)](image)

6.1.3 Add Referral and Coaching

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on CID for a particular task to navigate to Demographic tab of Individual.
- Step 4: Click on Outcomes & Support Notes tab and click on Individual Quality Outcome Measures Review date hyperlink in the table to open the selected Outcome Review form.
- Step 5: Select the Referral type or Coaching in the Outcome column.
- Step 6: Enter details in Add Referral/Coaching pop-up.
• Step 7: Click on the Submit button.

Figure 46

Figure 47

Figure 4.2 Referral and Coaching Tab
- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on CID# for a particular task to navigate to Demographic tab of the Individual.
- Step 4: Click on Referral and Coaching tab.
- Step 5: Select the Referral and Coaching ID and select the status of the referral from the drop-down list.
- Step 6: Click on the hyperlink to view the details.
- Step 7: Click on the Outcome Review button to update information. The system displays the Outcome Review section to enter comments and click to close.
- Step 8: Click on the Follow-Up hyperlink to add follow-up details. The system displays a new page to enter the follow-up information and click save.
Figure 50

Figure 51
6.3 Clinical Recommendation Tab

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on CID# for a particular task to navigate to Demographic tab of the Individual.
- Step 4: Click on the Outcomes & Support Notes.
- Step 5: Click on the Clinical Recommendation tab.
- Step 6: Click on hyperlink Icon. Click on the Follow-ups button.
- Step 7: Click on the Add New Follow-ups button.
- Step 8: Enter the details and Click on the Save button.
6.4 Request for Clinical Review Tab

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on CID# for a particular task to navigate to Demographic tab of Individual.
- Step 4: Click on the Outcomes & Support Notes.
- Step 5: Click on the Request for Clinical Review tab.
- Step 6: Click on Add a New Request button and click save.
- Step 7: Select Type of Request and enter details and Click on the submit button.
6.5 Add Support Note

- Step 1: Login to the IDD Connects portal and click on the Open Tasks tile.
- Step 2: View Tasks in View My Tasks tab.
- Step 3: Click on CID# for a particular task to navigate to Demographic tab of Individual.
- Step 4: Click on the Outcomes & Support Note.
- Step 5: Click on the Support Notes tab.
- Step 6: Click on Add Support Note button.
- Step 7: Enter details and click save.
Figure 60: Support Note page

Figure 61: Add Support Note
7. Individual 360

7.1 View Status History

- Step 1: After Login system displays ‘My Dashboard’ by default.
- Step 2: Search Individual and click on CID to navigate to the Demographics page of the Individual
- Step 3: Click on the ‘Individual 360’ Tab
- Step 4: Click on Status History tab
- Step 5: Click on Request Status Change
7.2 Health and Wellness

- Step 1: Log in IDD Connects portal.
- Step 2: Search an Individual and click on the CID# to navigate to Demographic tab of Individual.
- Step 3: Click on the Individual 360 tab to the Health and Wellness tab.
- Step 4: Click on the Edit Health and Wellness button located at the bottom of the screen.
- Step 5: User edits the details and clicks on the Save button.